

Montana Teachers' Retirement System (TRS)



Account
Information
Tutorial

NEW USER SIGN-UP

To create a personal account that will enable you to log-on to the TRS website, click the

Create an Account

button.

The TRS database will open a 'New User Sign-up' window.

User ID

Password

Login

Forgot Your User ID?

Forgot Your Password?

Create an Account

[Help?](#)

Enter the required information and click on the

Create Account

You may now access your TRS account information on-line.

New User Sign-up

Employee ID [What's This?](#)

Date of Birth MM DD YYYY

Choose a Security Question

Security Answer

User ID

Password

Verify Password

Choose Your Hint Question

Hint Answer

Because of the ubiquitous nature of web access and powerful password crackers, the TRS requires strong passwords for your protection. Your **password** must be at least **eight characters in length**, composed of at least **one number**, one **upper case letter**, and one **lower case letter**. Special characters can be used like: ~!#\$%^&*()-_+{}[]:"<>.,?/\ . Maximum length is 12 characters. Passwords expire after 60 days. [Click here for more password help.](#)

Create Account [Help?](#)

CHANGE LOG-IN INFORMATION

At any time you may update your 'Password' information.

Change Password

Jane Smith

User Id	<input type="text" value="jsmith"/>
Current Password	<input type="password"/>
New Password	<input type="password"/>
Verify	<input type="password"/>

Today is Monday, March 16, 2009.

You last signed in on Sunday, March 1, 2009 at 7:04 PM.

When changing the password, the user must change it on next login

[Help?](#)

Because of the ubiquitous nature of web access and powerful password crackers, the TRS requires strong passwords for your protection. Your **password** must be at least **eight characters in length**, composed of at least **one number**, one **upper case letter**, and one **lower case letter**. Special characters can be used like: ~!#\$%^&*()-_+{}[]:~!<>.,?/\. Maximum length is 12 characters. Passwords expire after 60 days.

To update this information, set your 'New Password' and Click the 'Save Changes' button.

CONTACT INFO

Jane Smith

Date of Birth	<input type="text" value="03/05/1952"/>		
Gender	<input type="text" value="Female"/>		
Address	<input type="text" value="123 Anywhere Street"/> <input type="text"/>		
City/State/Zip+4	<input type="text" value="Helena"/>	<input type="text" value="MT"/>	<input type="text" value="59601-0001"/>
Email Address	<input type="text" value="jsmith@mt.com"/>		
Home Phone	<input type="text" value="406"/>	<input type="text" value="442-1234"/>	
Cell Phone	<input type="text" value="406"/>	<input type="text" value="123-4567"/>	
Work Phone & Ext.	<input type="text" value="406"/>	<input type="text" value="444-1234"/>	<input type="text"/>
Marital Status	<input type="text" value="Married"/> <input type="button" value="v"/>		
Marital Date	<input type="text"/>		

[Help?](#)

Your 'Contact Information' will be used by TRS staff for mailing correspondence or other communications.

Your personal information on file with TRS may be updated at any time. To update your personal information, make the appropriate changes and click the button.

NAME CHANGE

TRS must be advised of any name change, in writing.

The 'Member/Recipient Name Change' form is available on the TRS web site.



Print, complete, and mail the properly completed form to the TRS office.

BENEFICIARIES

Beneficiary information is critical in the event of your death.

The recipient of any survivor benefit will be the beneficiary of record on file with TRS.



Upon your death, as an active or inactive vested member, each primary beneficiary designated will be entitled to his/her portion of any monthly survivor benefit payable or lump-sum refund of the account balance.

BENEFICIARY OF RECORD

Smith, Jane						
Today's Date/Time: 3/16/2009 8:48 AM						
Type	Relation-ship	Name	Gender	Date of Birth	Status	Phone
Primary	Spouse	Smith, John	Male	07/26/1949	Active	
Contingent	Son	Smith, Toby	Male	10/14/1975	Active	

In this example, Jane Smith submitted a 'Beneficiary Designation Form' to TRS, indicating her husband John as the 'Primary Beneficiary,' and her son Toby as a 'Contingent Beneficiary.'

The 'Beneficiary Designation For Active Members' form is available on the TRS web site.

Print, complete, and mail the form to the TRS office to update your beneficiary designation information.



ACCOUNT BALANCE

Your account balance represents contributions withheld from your gross wages and reported to TRS on your behalf, plus accumulated interest.

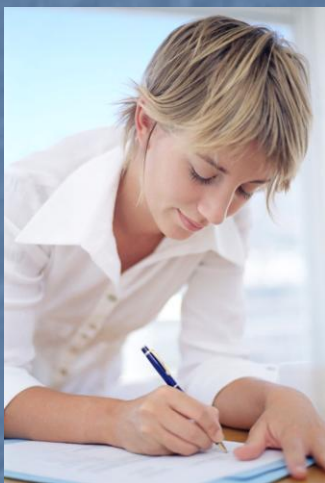
Smith, Jane Today's Date/Time: 4/6/2009 10:48 AM				
Total Contributions	Total Interest	Total Balance	Current Service Years	Date Last Contribution
93,307.68	41,748.38	135,056.06	30.00	03/31/2009

The employer contribution is not reflected in your account balance. It is placed in the pension trust fund and, together with investment earnings, provides funding for your retirement benefit throughout your lifetime.



RELEASE OF INFORMATION

As a TRS member, your account information is confidential. TRS receives many requests for information from banks, accountants, attorneys, spouses, and other interested parties. State law prohibits the release of any confidential information unless you, as the member, consent in writing, or we are otherwise required to release the information.



A request to release information to another person must be made in writing and signed by you, as the member.

The 'Authorization for Release of Information' form is available on the TRS web site.

Thank you for taking the time to view this 'Account Information' tutorial. The information provided in this tutorial is for educational purposes only. It is intended to provide basic information about the services and benefits provided by the Montana Teachers' Retirement System under the laws and rules applicable as of the date of production.

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